

# FileMaker Pro Introduction

*reSTORE DC/DC Main Streets*



Government of the District of Columbia Anthony A. Williams, Mayor

## Training Topics

### FileMaker Pro Overview

#### FileMaker Pro Modes [Help: "About FileMaker Pro modes"]

- Browse – add, view, change, sort, omit, and delete records
- Find – search for particular records
- Layouts
- Preview

#### Exporting Data to other Programs

Note: Text contained in this presentation was primarily extracted from FileMaker Pro 6.0 help files. Copyright © 1994 - 2002 FileMaker, Inc. All Rights Reserved.



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## FileMaker Pro Overview

### FileMaker Pro Overview [Help: "About FileMaker Pro databases"]

- Relational database
- Definitions – file, field, record, layout

### FMP saves changes as you make them

- Benefit: You do not have to remember to save updates
- Danger: There is no 'undo' command, except for changes to the **current record** ('record/restore' command)

### Safeguarding your data

- Need to define methods for editing and update (who, how)
- Back up files regularly and before making major changes



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## FileMaker Pro Definitions

[Help: "About FileMaker Pro databases"]

- Database: a collection of information that can be organized, updated, sorted, searched and printed.
- Database file: One file of information pertaining to a specific subject (such as 'contacts').
- Records: One set of fields in a database file. Each record contains data about a single activity, individual, subject or transaction
- Fields: Fields store, calculate and display the data entered into a record. The information in the field is its value.
- Layouts: An arrangement of fields, objects, pictures and layout parts that represents how information is organized and presented when you browse, preview and print records.



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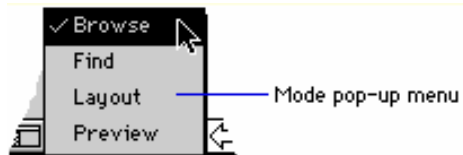
## FileMaker Pro Modes

### FileMaker Pro Modes [Help: "About FileMaker Pro modes"]

- Browse – add, view, change, sort, omit, and delete records
- Find – search for particular records
- Layouts – determine how information is presented on your screen or in printed reports, labels, and forms
- Preview – see how forms/reports will look when printed

### Switching between Modes [Help: "About FileMaker Pro modes"]

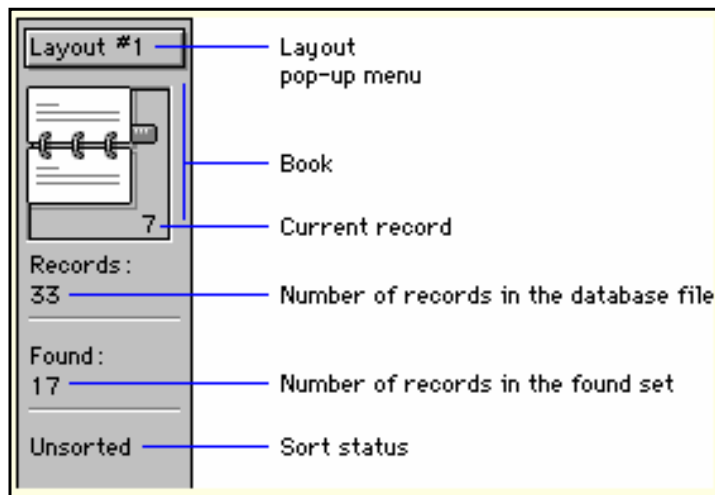
- View menu
- Mode popup menu (bottom left of FMP window)
- Keyboard shortcuts



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## Browse Mode: Viewing Data

### The Book Icon [Help: "Moving through records"]



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## Browse Mode: Viewing Data

### Moving through records [Help: "Moving through records"]

To move	Action
To the next record	Click the bottom page of the book.
To the previous record	Click the top page of the book.
To a specific record	Click the current record number at the bottom of the book, type the record number of the record you want, then press Enter (Windows) or Return (Mac).
Quickly through records	Drag the bookmark down or up to move to a specific record.
Through records in a list or table	Use the scroll bar on the right side of the window.



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## Browse Mode: Adding / Duplicating Records

### Adding a new record [Help: "Adding and Duplicating records"]

- In Browse mode, choose Records menu > New Record.

### To add a record with the same or similar data as an existing record:

- Select the record you want to duplicate. (Use Find mode to locate the record, if necessary.)
- Choose Records menu > Duplicate Record.



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## Browse Mode: Restore Data in Current Record

If you enter data incorrectly in a record, you can restore the original data to the record *as long as the information is not committed*.

Data is committed when you:

- select another record
- click anywhere outside of the current record
- press Enter on the numeric keypad, or Ctrl+Enter on computers without a numeric keypad in Windows or Enter (not Return) on a Mac

To restore original data to a record in Browse mode: Choose Records menu > Revert Record. Data has already been committed if Revert Record is dimmed.

[Help: "Restoring Data in Records"]



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## Browse Mode: Sorting Data

- FileMaker Pro stores records in the order they were added to the file. Sorting temporarily rearranges records, so you can view, update, or print them in a different sequence.
- You choose the fields whose contents you want to sort by. The first sort field arranges the records based on the field's contents. The second sort field arranges records when two or more records have the same value in the first sort field, and so on. You can sort records in ascending order, descending order, or in a custom order.
- The records remain sorted until you perform a find, add new records, or sort the records again.

[Help: "Sorting records"]



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## Find Mode

### To find specific records

- Go to a layout that has fields you want to enter criteria in. You can change layouts and enter criteria on more than one layout.
- Choose View menu > Find Mode.
- In the find request, select a text, number, date, time, or calculation field to use for finding, and then type a value in the field. You can use the Symbols list in the status area to help you enter criteria.
- [To enter more criteria, select Requests > add a new request]
- Click Find in the status area, or choose Requests menu > Perform Find.

### To show all records

- In Browse mode: choose Records menu > Show All Records.
- In Find mode, choose Requests menu > Show All Records.
- You do not need to choose Show All Records before performing finds. FileMaker Pro always searches the entire database.



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## Find Mode: Operator Symbols

<	Less than	< 40
<=	Less than or equal to	<= 12/30/03
>	Greater than	> 0
>=	Greater than or equal to	>= G
=	Exact match	= 34.52
...	Range	2000...2399
!	Duplicates	!
//	Today's date	//
@	Wildcard: one character	Sm@th
*	Wildcard: zero or more characters	Ric*
"	Specific text or phrase	"Main Street"



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## Find Mode: Excluding records

### Finding records that don't match criteria

- In Find mode, type criteria for the records to omit
- Select Omit.
- Click Find.

### Finding records while omitting others

- In Find mode, type the criteria for the records to find
- Choose Requests menu > Add New Request.
- Type criteria for the records to exclude
- Select Omit.
- Click Find.

[Help: "Finding Records except those matching criteria"]



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## Find Mode: Expanding/reducing found records

### Finding records on multiple criteria in separate fields (logical AND)

- Perform a find
- Switch back to find mode and specify the next criteria
- Choose Requests > Constrain Found Set.
- The new find will only search records that were selected in the first 'find'.

### Finding records that match multiple criteria in the same or different fields (logical OR)

- Perform a find
- Switch back to find mode and specify the next criteria
- Choose Requests > Extend Found Set.
- Records found in the second 'find' will be added to those selected in the first 'find'



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## Layout Mode

### Layouts

- Define views of the data/information in the database
- It is possible to have multiple views/presentations of the same database
- Layouts can contain all of the fields in a database or only selected fields.
- Data in the fields that are not show still exist, they are simply not accessible through that layout.



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## Exporting Data

### To export data to be used in another application

- Find and sort the records you want to export.
- Choose File menu > Export Records.
- In the dialog box, type name and select a location for the file.
- Choose a file type from the Save as type list then click Save.
- In the Specify Field Order for Export dialog box, indicate how you want FileMaker Pro to export the data.
- Click Export.

### To use an exported file

- Open an application that can read the file format, and then open the file.



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